



# TEI Template User Guide

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## Introduction

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This document is intended to provide guidance for populating the following templates:

- Course Design Document – Instructor-Led Training Template
- Course Design Document – Web-Based Training Template
- Non-Procedure Instructor Guide Template
- Procedure Instructor Guide Template
- Non-Procedure Participant Guide Template
- Procedure Participant Guide Template
- Practical Exercises Template

This document will provide instruction on how to use styles in Word and PowerPoint, which is absolutely essential to the successful creation of new documents from these templates.



## Getting Started in Microsoft Word

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### What is a Template?

A Word template (.dot file) is a framework in which documents can be created. This framework contains fonts and other styles specific to a certain purpose. For example, the text in this paragraph is the same font as the text paragraphs within the Procedure Instructor Guide because they were both created using the same template, or framework.

Templates contain a number of styles that can be applied to otherwise unformatted text and objects. When the appropriate steps are followed in using templates, the result is a consistent, coherent, and attractive document.

### Creating a New Document

When creating a new document from a template, it is important to start from the RTDC Document Library at <https://www.firstrespondertraining.gov>

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**Note:** A new document must be downloaded from the RTDC website every time you create a new document. Starting from a clean document in the library EVERY TIME will ensure that styles do not become corrupted. You should NEVER create a new document by deleting the content in a document you have already created. This could lead to corruption of the template and a computer crash.

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## Using Microsoft Word

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Styles are essential in formatting a document and keeping it clean and consistent. It is an easy procedure and is very useful in saving time and frustration with formatting.

### Importing (Copying and Pasting) Content into a New Document


#### Paste Special

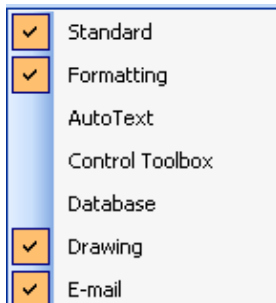
When importing content from one Word document to another, it is imperative that you use the Paste Special tool.

In the original document, select the content you wish to transfer and hit CTRL+C to copy the content. Then place your cursor at the desired location within the new document. From your toolbar, Select Edit > Paste Special > Unformatted Text, and click OK. This will import the content without attaching the associated styles from the source document. When a simple Paste is performed, the styles from the original document are attached to all of the text, causing corruption of the template, and possibly a Word crash and loss of the document.

After you have entered the content, you are ready to apply styles.

#### The Style Sidebar

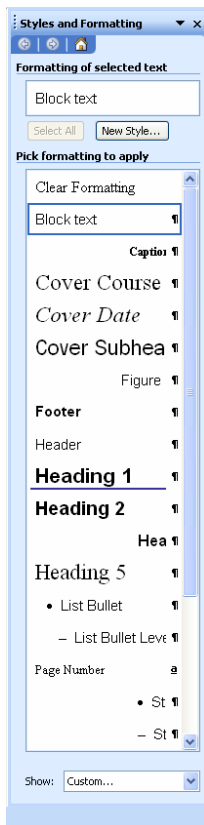
When formatting text within a new document created from a template, begin by opening the Styles and Formatting sidebar. To do this, click on the button within your toolbar that looks like this: . If no such button appears in your toolbar, right-click anywhere in the toolbar and click Formatting (see below).








Once you have clicked , a sidebar will open that looks like this:



Within this sidebar are all of the styles that you will need to use when formatting your document.

## Applying Styles

To apply a style, first select the element that you would like to format. When formatting a selection of text, make sure that the entire body of text is highlighted, including the return at the end of any paragraph. If you are not sure whether the return is highlighted, click the  button within the toolbar. (If this does not appear within the toolbar, right-click anywhere within the toolbar and select Standard.) This will reveal the formatting of the document, including spaces and returns, so that you can properly select an entire paragraph. If you do not select an entire paragraph, Word will often create new, unwanted styles to identify the remainder of the paragraph. This will clutter the Style sheet.

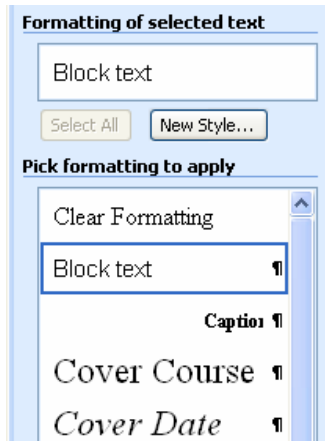
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**Note:** An easy way to ensure that the entire paragraph receives the formatting is to simply click anywhere within the paragraph, rather than attempting to highlighting it all. This will cause any return at the end of the paragraph to be formatted in addition to all of the text.

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Once your selection is highlighted, simply find the desired style within the Styles and Formatting sidebar and click it.

For example, to format this paragraph, the author clicked somewhere within the paragraph and clicked “Block text” within the sidebar (see below).



As you can see, the “Formatting of selected text” window shows that the paragraph is now formatted as “Block text”. If an author follows this procedure for every paragraph within the body of the document, they will all appear the same.

This formatting technique is not limited to text. Figures and tables can be formatted similarly. NEVER manually change the font of any text or add bullets or numbering manually. Styles have been created within the templates to make this unnecessary. Doing so will clutter your document with unwanted new styles and make the document look inconsistent.

### Figure/Table Captions

To insert a caption for a table or figure, right-click the item and choose Caption. Enter the desired specifications and name, and click OK. For PowerPoint slides, make sure Slide is chosen from the Label pull-down menu.

### Headings and the Table of Contents

The proper formatting of headings is absolutely essential in creating a functional document. The hierarchy of headings is the basis for the structure of the Table of Contents (TOC).

The TOC is not text, per se, but a “field” that recognizes certain styles within a document and reflects them. For instance, whenever a selection of text is formatted as “Heading 1” in a document, the TOC will show that text in bold, left-justified. When a selection of text is formatted as “Heading 2”, the TOC will show that text as a subheading to its respective Heading 1 entry, slightly more indented.

The text within the TOC should NEVER be typed in manually. To update the TOC, place your cursor anywhere within the TOC, right-click and select Update Field. If presented with the option, choose “Update Entire Field”. This will reflect every instance of the Header 1 and Header 2 styles within the document.

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**Note:** To ensure that you never print a document with an out-of-date TOC, select Tools > Options > Print tab, and make sure the Update Fields checkbox is checked. This will automatically update all fields (including the TOC) before the document is printed.

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### Populating Headers and Footers

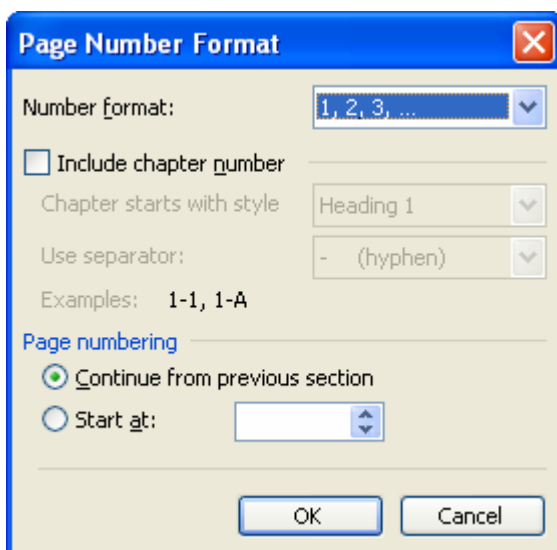
To populate the header and footer of your document, from your toolbar select View > Header and Footer. This will make the header and footer open, allowing you to alter the text therein.



To change any text within the header and footer, simply delete the text that is already there and substitute your own. The styles and location of the text within the header and footer are already arranged, DO NOT alter them. Headers and footers are easily corrupted, so be careful to only delete the desired text and substitute your own.

DO NOT delete the page number in the footer if it is incorrect. If the page number has restarted at “1” unexpectedly, follow these steps to fix it:

1. Open the footer. (Either double-click the footer or choose View > Header and Footer.)
2. Click on the page number.
3. In the Header and Footer toolbar that pops up, choose the  Format Page Number icon.
4. In the resulting pop-up window, choose “Continue from previous section”.



5. Click “OK”.





## Microsoft PowerPoint

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When creating a new document from a template, it is important to start from the RTDC Document Library at <https://www.firstrespondertraining.gov>.

PowerPoint slides may need to be added to the Participant and Instructor Guides at some point. In order to make these appear consistent and keep the file size of your Word document to a minimum, the following guidelines must be followed.

### PowerPoint Template

A PowerPoint template has been created to keep the text styles and backgrounds consistent among the slides. There is no Styles and Formatting sidebar equivalent in PowerPoint, however, the template illustrates the two slide styles that are available.

#### Creating a New Slide

To create a new slide, click “New Slide” at the top-right of your PowerPoint toolbar.



This will automatically insert a slide in the style of the previous slide. To change the appearance of the slide, click the “Design” button, located next to the “New Slide” button.



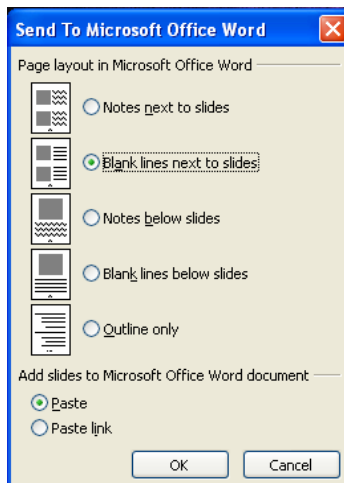
This will bring up a sidebar with thumbnails of all available slide styles, including the two that were created for this template. Once the appropriate style is chosen, content can be entered into the slide itself, which contains text formats.

#### Formatting Text within a PowerPoint Slide

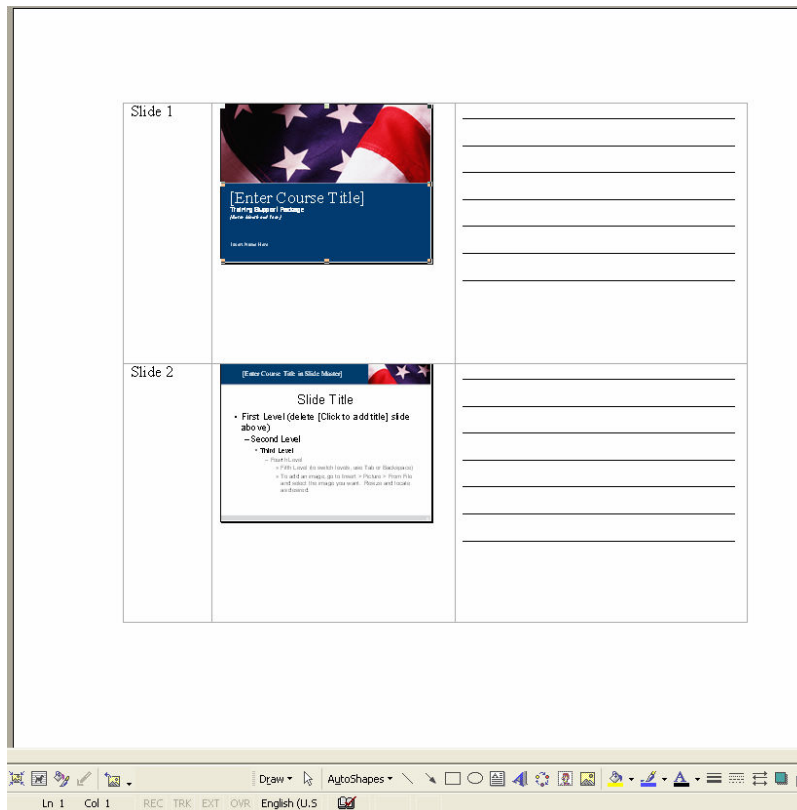
Once you have created a new slide within the PowerPoint presentation, the Tab key can be used to cycle through pre-made bullet styles.

#### Reducing File Size – Importing PowerPoint Presentation into Word

To import your PowerPoint presentation into Word, select File > Send To > Microsoft Office Word. In the popup window that appears, choose “Blank lines next to slides” and click OK.



This will create a new Word document that looks like this:



## Reducing File Size – Making Slides Non-interactive

Once the above document is created in Word, you will need to make each slide non-interactive. This means that after the fact, any changes to a particular slide must be made within PowerPoint, and the importation process must be followed again.

First, click the desired slide one time so that it is highlighted. Then, hold Ctrl+Shift and hit F9. This will convert the slide file into a single, non-interactive element, which greatly reduces the file size. Repeat this step for each slide.



The slides are now ready to be imported into your final document.

### **Importing Slides into a New Document**

To import the slides from the Word document you have just created into your final document, follow the steps for Importing (Copying and Pasting) Content into a New Document on page 4.



## Explanation of Each Style

Styles and Formatting Button	When to use...
Clear Formatting	<b>Clear Formatting:</b> Used to remove any style associated with text. Useful if the text is encountering formatting issues. A style should always be applied after using Clear Formatting.
Block text ¶	<b>Block text:</b> Used for paragraph text within a document.
Caption ¶	<b>Caption:</b> Used to apply a caption below a PowerPoint slide in the Non-Procedure documents.
Course C ¶	<b>Course Content:</b> Used to enter the content of a slide below the slide in the Non-Procedure documents.
Cover Course ¶	<b>Cover Course:</b> Used for the title of the course on the cover page of the document.
Cover Date ¶	<b>Cover Date:</b> Used for the date on the cover of the document.
Cover Subhead ¶	<b>Cover Subhead:</b> Used for the subheading on the cover page of the document.
Figure ¶	<b>Figure:</b> Used for the actual slide that is inserted in the Non-Procedure documents. Select the slide and click this style to send the slide to the appropriate indent. IT IS NOT NECESSARY TO USE THIS IN THE PROCEDURE DOCUMENTS.
Footer ¶	<b>Footer:</b> The style applied to the footer of the document. It is not necessary to apply this to the footer. Simply delete the placeholder text and enter the appropriate information.
Header ¶	<b>Header:</b> The style applied to the header of the document. It is not necessary to apply this to the header. Simply delete the placeholder text and enter the appropriate information.
<u>Heading 1</u> ¶	<b>Heading 1:</b> Used for the major headings in a document. This is the text that will appear as the major heading in the Table of Contents.
Heading 2 ¶	<b>Heading 2:</b> Used for the headings that fall under respective Heading 1 headings. This is the text that will appear as the second-tier text in the Table of Contents.
Heading 3 ¶	<b>Heading 3:</b> Used for the headings that fall under respective Heading 3 headings. This is the text that will appear as the third-tier text in the Table of Contents.



Styles and Formatting Button	When to use...
• List Bullet ¶	<b>List Bullet:</b> Used for major bullet points within the document.
– List Bullet Level 2 ¶	<b>List Bullet Level 2:</b> Used for bullet points that fall under respective List Bullet points.
Page Number ¶	<b>Page Number:</b> Used for the page number at the bottom of each page. DO NOT APPLY THIS TO THE PAGE NUMBER. The document will automatically apply this when a new page is created.
Table Heading ¶	<b>Table Heading:</b> The style associated with the top row of a table. Since Each document has built-in table styles, it should not be necessary to apply this to a header.
Table Text ¶	<b>Table Text:</b> The style associated with the content within a table. This should automatically be associated with the default table style.
<u>TOC Title</u> ¶	<b>TOC Title:</b> Used for the title of the Table of Contents. This appears to be the same style as Heading 1, but the Table of Contents will not recognize this style. This allows for the Table of Contents title to appear the same as all Heading 1 text, but not show up in the actual Table of Contents.
Procedure Table ¶	<b>Procedure Table:</b> Used for tables listing the steps in the Procedure documents.
1. Step Number ¶	<b>Step Number:</b> Used for the numbers in the left-hand column of the Procedure tables listing the steps in a procedure. If a Procedure Table does not show numbers in the “Step” column, select all of the cells in that column and click this style in the Styles and Formatting sidebar.
– List Bullet Topic ¶	<b>List Bullet Topic:</b> Used for listing Topics in the CDD documents.
Module Heading ¶	<b>Module Heading:</b> Used for listing Modules in the CDD documents.